

# Skills-based Volunteerism

*Presented by:*

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June 26, 2007

Discover how employee volunteer programs are working to expand and develop staff skills, while at the same time helping to build the capacity of community organizations to address serious social issues.

- **Session Kick-off**
  - Introductions, Objectives, Agenda Review
- **What is Skills-based Volunteerism?**
- **Why the Need for Skills-based Volunteerism?**
- **How to start a Skills-based Volunteerism program**
- **Wrap-up**

- 1) Learn ways to develop employee skills through volunteering, and other potential benefits from this type of volunteer experience.**
- 2) Gain knowledge about different approaches your company can take to create your own skills-based program.**
- 3) Learn how to be prepared for the potential challenges that may arise.**

# What is Skills-based Volunteerism?

## *Definition*

Volunteerism which uses functional business skills, experience or education. Impacts organizations and individuals.

Volunteerism which finds the intersection of corporate values and skills and then matches those characteristics to the needs of local non-profits.

- Not a new concept
- Beginnings in the legal community
  - Long history of pro-bono services
- Growth in technology, financial services, marketing, consulting

### **Includes professions and skilled trades:**

- Marketing
- Human Resources
- Information Technology
- Public Affairs
- Accounting/Finance
- Electrical
- Engineering
- Legal
- Web Design

## Structure:

- Group or team work
- Individual assignments
- Loaned executives
- Can be an internally focused program or a partnership with 3<sup>rd</sup>-party providers

# Why the Need for Skills-based Volunteerism?

## Why the Need for Skills-based Volunteerism?

### ***The Gap between Non-profit (NP) Need and Volunteer Ability\****

- 9 out of 10 NPs realize that volunteer skills are extremely valuable
- 77% of NPs believe they would benefit from corporate volunteers
- 75% of volunteers believe their workplace skills are valuable to a NP

But...

- 62% of NPs do not work with corporate volunteers
- Only 12% of NPs align tasks with volunteer skills
- Only 19% of volunteers say their workplace skills are their primary volunteer service

*Narrow view of corporate collaboration from all\*:*

- 56% of NPs feel \$\$ is the most valuable contribution a company can make

*Reality— only 1% of NP operating budgets come from corporate \$\$*

*NPs are just starting to recognize corporate skills-based volunteerism:*

Reasons volunteers not using their business skills:

- NP did not inquire about their workplace skills, 34%
- NP not structured to use their skills, 32%
- Volunteers' workplace skills were not valuable to the NP, 27%
- NP could not find a way to use the volunteer's skills, 22%

# Growth of Skills-based Volunteerism

## Why the current popularity in skills-based volunteerism?

- Trend towards non-profit support consolidation
- On-set of “boomer” ism and Gen Y’s
- Workforce entrance of the most volunteer inclined population in our country’s history
- Need for “smart” volunteerism vs. “more” volunteerism
- Use of layered volunteerism
- General growth and sophistication of the corporate volunteerism field

### **Corporate benefits of skills-based volunteerism**

- Enhances existing and develops new employee skills
- Expands corporate in-kind opportunity
- Permits more in-depth relationships with NP partners
- Enhances reputation of company and its values

## **Why did Deloitte choose to focus on skills-based volunteering?**

- Solving complex problems is something that we do in our day-to-day business
- This ability is what the community needs most
- Large number of highly-skilled volunteers
- Community involvement is a cost-effective platform to showcase our Firm's talents and capabilities

## Outcomes using an internally-driven model

- Leadership development for volunteer staff
- Internal cross teaming opportunities
- Transfer of needed business skills to community
- Ability to connect/partner with clients on NP engagements (business development)
- Reputation and eminence enhancements

## Lessons Learned using an internally-driven model

- Need dedicated staff and resources to support volunteer core
- Top level management support is critical
- Managing volunteer corps requires “rewards & recognition-based model” for success
- Still need to partner with key community NPs
- Identify what your company is good at and use that as the platform to focus your volunteer efforts

## 3<sup>rd</sup> party support options

- Volunteer Centers and HandsOn Network Affiliates
- NPower affiliates
- Taproot Foundation
- United Way Affiliates
- Specialized skills-based groups (i.e. MBA Alumni Groups, etc.)

## Opportunities Realized with 3<sup>rd</sup> Party Program

- Can be incredibly rewarding for all parties
- Very high level of need assessment yielded projects that were focused, timely for the agency and maximized impact to the NP
- Foundation building opportunity for the NP sector is large
- NPs need training, tools and guidance

## Lessons Learned with a 3<sup>rd</sup> Party Program

- Start with clear objectives and requirements for company, NP partners and employees
- Manage expectations
- Find ways to build internal management capacity to fill recruitment and leadership gaps
- Understand constraints of this type of volunteerism
- Most NPs are not ready to manage this type of volunteer

- Community Volunteerism Councils
- Relationships with forward-thinking NPs
- Skills-assessment
- Skills matrix
- Community/Agency needs assessment

- Geographically based employee groups
- Manage volunteerism activities for their location on a year-round basis
- Typical roles:
  - Defining strategy and goals for volunteer program
  - Setting budgets
  - Liaison to senior management
  - Recruiting members
  - Communicating volunteer opportunities and outcomes
  - Recognizing volunteers and events
  - Managing volunteer registration

- Compile list of non-profits you've worked with in the past (volunteer activities, board relationships, financial support)
- Rate agencies on their interest in working with you on skills-based events thru agency discussions
- Target top 5-10 agencies for in-depth meetings with executive director or board members
- Bring skills assessment and skills matrix data to meetings as a “menu” for best opportunities

- Determine your company's primary business focus and its supporting services
- Identify what business skill(s) you'd like to be known for in the community
- What are the pressing challenges facing your community?
- “Low hanging fruit”– which business groups are the most interested in volunteering their skills?
  - Start with them, publicize the outcomes and leverage to target other groups

- Develop a “skills matrix” of volunteer matches based on your company’s structure

# Matrix of Volunteer Matches

## Deloitte

Consulting	Tax or Audit	Info Tech	Financial Advisory Services	Other Professionals
<p>CRM activities on managing donor pools (in-kind and financial).</p> <p>Retail store advisement and maximization plans.</p>	<p>Income tax preparation</p>	<p>IT consulting</p>	<p>Advising on Board governance</p>	<p>Mktg or PR staff advise on media relations pr publicity plan.</p> <p>Develop annual report or brochure. Lead an effective communications class for NP staff</p>
<p>Effectiveness courses for NP management &amp; board members on managing change, effective leadership strategies communications with donors.</p>	<p>Preliminary review &amp; advisement on general topics around financial reporting</p>	<p>Networking/connectivity/ virus protection projects.</p>	<p>Balance sheet instruction &amp; class on how to read financial reports for board members</p>	<p>Administration professionals can assist in creating donor tracking dbase or mailing campaign.</p> <p>Assist with office re-org and staff efficiency/effectiveness.</p>
<p>Specific consulting opportunities based on consulting specialty</p> <p>Health care- public health/wellness, Public Sector- working with government agencies, etc.</p>	<p>Advisement on maximizing advantages of non-profit tax status</p>	<p>Upgrades</p>	<p>Creative fund raising and cash management strategies related to specific NP challenges</p>	<p>HR staff can advise on creation of employee handbook, recruiting and staff retention strategies</p>
<p>Advising on Board governance</p>	<p>Advisement on operating with limited budget and maximizing limited resources</p>	<p>Equipment donations and installs</p>	<p>Advise on improving operational processes and efficiencies, reducing expenses, improving agency viability and value to communities</p>	<p>Finance staff can lead classes on financial reporting and budgetary procedures</p>

- Determine if agency has end-user clients
  - If **yes**, skills-based volunteering could be tailored to the agency's clients (i.e.- personal finance, tax preparation, job-skills training, personal effectiveness, etc.)
  - If **no**, skills-based volunteering could be focused on services to support infrastructure or operations of agency (IT solutions, leadership training, budgetary or governance projects, etc.)

# Top 10 Considerations for Skills-Based Volunteering

1. NP Vetting/Readiness
2. Project Vetting
3. Corporate Risk & Reputation
4. Scalability
5. Volunteer Skill Assessment
6. Project Management
7. Corporate infrastructure
8. Outcome Measurement
9. Episodic vs. long term
10. Company's focus areas

- ... There is a growing and acute need to transfer business skills and intellectual capital via volunteerism to NPs.
- ... Corporate America can help NPs achieve their missions and social impact by contributing their expertise in strategic planning, finance, operations, accounting, law, human resources, marketing, communications and other disciplines.

# Contact Information

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*Thank you!*

## Data Source\*

Data referenced in presentation from the  
*2006 Deloitte/Points of Light Volunteer  
IMPACT Study*